

Amendments to the Specification:

Page 3, paragraph [0016], replace with the following:

b¹ [0016] Another object of the present invention is to provide a process to enable organizations to avoid losses due to attrition or meeting cancellation and to take advantage of opportunities to reduce meeting costs.

In one embodiment of the present invention, the invention includes a link to a global informational network, such as Internet

Page 5, paragraph [0020], replace with the following:

b² [0020] FIG. 1A is a flowchart illustrating an overview of the method for planning meetings from a planning perspective;

FIG. 1B illustrates a user interface for entering information into the meeting planning system in accordance with the present invention;

FIG. 1C illustrates a meeting planning calendar feature;

FIG. 2A is a flowchart illustrating an overview of the method for planning meetings from a financial perspective;

FIG. 2B illustrates a sample budget user interface in accordance with the present invention;

FIG. 3A is a flowchart illustrating the request for proposal process and the use of historical financial information; and

FIG. 3B is a chart illustrating the sources of information and users of consolidated reports produced by the meeting planning system of the present invention.

Page 10, paragraph [0032], replace with the following:

b³ [0032] Once a meeting planner has scheduled a meeting 16, the meeting planner selects another part of the dynamic meeting data, which is the destination for the meeting 20. Destinations are geographically separate locations, typically cities, where a meeting can be held. To select a des-

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tination for a meeting 20 a meeting planner conducts a search for suitable venues against a database contained in the meeting planning system. A venue, i.e., a supplier of meeting space, is a conference center, convention center, hotel, restaurant, theater or other site or combination of any of these where a meeting or events are held. When selecting a venue, a meeting planner takes into account the availability of suitable meeting space, the number of available guestrooms, the quality of the venue and a variety of other factors. Naturally, cost is a major factor in selecting a destination. To assist the meeting planner in evaluating costs an organization includes various rates for guest rooms and meeting rooms in the meeting planning system. Rates for guest rooms and meeting rooms an organization displays in the meeting planning system include: preferred rates negotiated with a venue, distressed rates for unsold space a venue is trying to fill, standard rates sometimes called "rack rates", averages rates, seasonal rates, rates for the specific dates the meeting is scheduled or any other special rates or standard rates offered by a venue.

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Pages 12 and 13, paragraphs [0037] through [0040], replace with the following:

[0037] Once a meeting planner has selected a destination 20, and in the process confirmed the availability of guest room and meeting space at the meeting planner's chosen venues, the meeting planner converts a tentative date range on the organization's meeting calendar 18 to a definite date range as shown by a ~~broken~~-arrow 19 connecting the Destination Selection 20 with scheduling the meeting 16. The meeting planning system deletes any other tentative date ranges for the meeting.

[0038] Depending on the preferences of people in the planning organization, owning organization, meeting planner, and the requirements and complexity of a meeting, a meeting planner may complete the steps of defining the events for the meeting 14, scheduling the meeting 16, and selecting a destination for the meeting 20 in any order or these steps may be completed in an iterative or 'leap frog' sequence.

[0039] It is convenient to discuss the remainder of the meeting planning process as two separate processes, Meeting Logistics 24, and Attendee Services 26. Meeting Logistics 24 involves coordination of suppliers 32 and the delivery of all the resources 34 the suppliers 32-will provide to a

meeting. Attendee Services 26 involves coordination of all the services that enable attendees to participate in a meeting including; registration 30, hotel booking 40 and travel booking 42. Although Meeting Logistics 24 and Attendee Services 26 will be discussed separately, the meeting planning system shares a great deal of information between the two processes. Each process will now be described and explained in detail.

[0040] Beginning with Meeting Logistics 24, once a meeting planner defines the events for a meeting 20 the meeting planner selects the supplier categories 28 that are appropriate to the meeting and events. Standard categories used in the meeting planning industry are numerous. Examples include, but are not limited to food and beverage, meeting room rental, guest room rental, audio-visual equipment rental, equipment rental, printing, advertising, air travel, car rental, insurance, staffing and a variety of other categories. Products and services for some of these categories are typically provided by the owning organization or planning organization. The meeting planning system provides these and other supplier categories 28 as standards and provides the functionality to add additional supplier categories 28 if needed by an organization for a particular meeting. The supplier categories 28 identify the general kinds of resources required for a meeting. The process of selecting supplier categories 28 from a collection of standard categories provides a standard model for meeting planners to use in managing and organizing Meeting Logistics. The supplier categories also provide a framework for managing meeting finances which will be described later. Ideally, a single supplier 32 will provide all the resources required for a supplier category, but, multiple suppliers 32 for a supplier category 28 may be designated in the meeting planning system.

Page 14, paragraph [0042], replace with the following:

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[0042] As shown in FIG. 3A, the The meeting planning system also provides a means for a meeting planner to track RFPs 22, 32 sent to 160 and replies received from 162 venues and suppliers 32. The tracking process provides a schedule for each category which includes the date RFPs 22, 32 should be sent to a venue or other supplier, the date the RFP 22, 32 was actually sent, the date responses are due from venues or other suppliers, the date a decision will be made

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and a mechanism to remind the meeting planner when each of these dates approaches. The tracking or communications portion of the invention in conjunction with the proposal processing unit tabulates the RFP responses from the venues 22 and suppliers 32 within each category and allows the meeting planner to designate the selected venues and suppliers from the responses received. The tracking system may also prompt the planner to send a reminder 164 to a venue or supplier who has not yet responded to the RFP 22, 32. The communications unit also allows data and information to be shared among the various features of the present invention.

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Page 16, paragraph [0047], replace with the following:

[0047] FIGS. 1B and 1C illustrate portions of the meeting planning system of the present invention. FIG. 1B shows an example of a computerized interface used to enter, modify, and/or display meeting identification and scheduling information. The interface allows a user to enter or select information such as meeting status 196, meeting description information 198, company data 216 for the meeting planning organization. Other fields 218 may also be defined for keeping track of organization specific codes, such as approval codes, account numbers and identification numbers. The interface shows the status 196 of various aspects of the meeting planning process, such as RFP's, budgets, events, and the meeting as a whole. Identifying information for a meeting 198 is also displayed on the interface. Information such as meeting name 200, the starting and ending dates of meeting 202, the attendance for the meeting 204, the estimated number of room nights and/or rooms needed 206, the type of meeting 208, the facility where the meeting will be held 210, the name of the planner 212 and any descriptive information about the meeting 214. The meeting information which can be entered into or displayed on the interface is not limited to the above examples. The information described above can be typed into the system, selected from drop down or other menus, or imported into the interface by the tracking system associated with the present invention.

Pages 18 through 30, paragraphs [0051] through [0077], replace with the following:

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[0051] Referring now to FIGS. 2A and 3A, the financial aspects of planning a meeting using the meeting planning system will now be described and explained in detail with reference to the meeting planning process illustrated in FIG. 1A. The financial aspects of managing meeting planning operations in the present invention may be conducted by a budget unit that is part of a meeting planning system, a computer program product which provides instructions to a computer to perform budget manipulations or a method carried out using a computer. Dynamic financial data as used in the system, method or computer program product of the present invention consists of proposed or actual costs for resources as well as income. The dynamic financial data may be comprised of any monetary amount used by or under the control of the meeting planner that relates to the conduct of the meeting. This financial data includes quotations for the provision of goods and services, actual charges, costs, taxes, gratuities, service charges, income, complementary goods or services, cost or charge forecasts, and variances among the financial data. Items such as taxes and gratuities are generally included under the general heading of costs, because they are paid out by the organization. However, if these or other items such as service charges or gratuities are not paid by the organization, then the items would not be included in the cost categories. The financial data may also consist of the spending data or expenditures of an organization for one particular meeting or for a plurality of meetings from a single meeting to all of the meetings owned or planned by a particular organization. The dynamic financial data may also be used in generating reports regarding the meeting.

[0052] A meeting planner or budget planner 168 begins the process of managing the financial aspects a meeting by creating a budget 50. A meeting planner generally prepares a budget from the history 38_(FIG. 1A) of a past meeting, the present meeting or using data from a similar meeting. A budget consists of two general parts, income 60 and costs 58, except in cases where a meeting does not generate income 60. Income 60 consists of funds received from sponsors, attendees, particularly exhibitors and participants, sales, particularly concessions, and interest income.

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[0053] To permit effective management of meeting costs 58, meeting cost categories are defined which correspond to supplier categories 28. Meeting costs 58 may be fixed or variable. Fixed meeting costs typically do not change with attendance. Variable meeting costs usually do change with attendance. The present invention is particularly effective for managing variable meeting costs, as is explained herein.

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[0055] The meeting planning system generates a budget 50 based on history 38 (FIG. 1A). Since meeting planners often schedule meetings several years in advance, the meeting planning system projects income and costs several years into the future using either a linear or exponential projection and factoring changes in the inflation rate, obtained estimates from financial service companies or financial publications, and trends in attendance from history 38 into the projections.

[0056] After completing a budget 50 for a meeting, a meeting planner proceeds to gather other financial data including quotes or proposals 52 in order to forecast 54 costs for the various costs categories. Referring to FIG. 1A, a meeting planner obtains quotes as responses to RFPs 22, 32 sent to venues when selecting a destination 20 and from suppliers 32 when selecting resources required 34 for a meeting. The responses are received or entered into the proposal processing unit or portion of the system, method or computer program product of the present invention. The budget portion of the meeting planning system calculates and displays the variance 56 of the forecast 54 from the budget 50 to identify potential cost overruns or surplus. A meeting planner then adjusts the meeting plans to eliminate the cost overruns or to reallocate surplus if necessary.

[0057] Once a meeting planner has received the quotes 52 for products and services for a meeting, the meeting planner proceeds to select a destination 20 or select resources required 34 (FIG. 1). Following the selection process the meeting planner places orders with suppliers 32 and begins to incur costs 58. The meeting planner also begins the registration process 30 then begins to receive income 60.

[0058] An owning organization or planning organization may choose to manage costs 58 and income 60 at one of two levels; the meeting level or the event level. Each of these options will now be described and explained in detail. Beginning with the first option, when an organization

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chooses to manage costs and income at the meeting level, the costs are broken down into the cost categories for the entire meeting. A meeting planner also manages suppliers 32-(FIG. 1A)-at this level. The same financial information a meeting planner needs to select a destination 20 and select the resources required 34 for a meeting is needed to create a forecast 54. As a result, the tracking system previously described for managing RFP responses 22, 32 from venues 22 and suppliers 32-also gathers the quotes 52 needed to prepare a forecast 54 and calculate variance 56. Therefore, when an owning organization or planning organization provides the meeting planning system with the tracking tool for RFP responses 22, 32 to its meeting planners, it gives the meeting planners an incentive to use a system that will also gather financial information the organization requires about all the organization's meetings.

[0059] The second option an organization may choose for managing costs 58 and income 60 is at the event level which will now be described and explained in detail. When an organization chooses to manage costs 58 and income 60 at the event level, costs 58 and income 60 are broken down into the categories for each event within the meeting. Some of the income 60 collected at the event level comes from sponsoring organizations that sponsor one or more events. Another source of income at the event level is the attendees that register 30 for events 36 for which a fee is charged. As a result, the registration 30 process in the meeting planning system is another tool for meeting planners that collects financial information, in this case income 60 information, for an organization at the event level just as the RFP 22-tracking tool collected cost 58 information for the organization at the meeting level. However, some income 60, such as registration fees for the meeting as a whole, is not collected at the event level. Therefore, the meeting planning system provides methods to distribute meeting income 60 based on; event attendance, a flat percentage per event, attendance for the day and other means.

[0060] When a meeting planner manages costs 58 at the event level the meeting planner finds that costs 58, like income 60, are differentiated in that they are sometimes incurred at the event level and sometimes at the meeting level. Examples of costs 58 that are typically incurred at the event level are charges for room setup, catering, speakers, and any other resources needed only for a single event. Examples of costs 58 that are typically incurred at the meeting level are

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charges for meeting room rental, audio visual and equipment rental, destination management services and other services that support more than one event. A meeting planner distributes the costs 58 incurred at the meeting level to the individual events in the meeting planning system based on factors such as attendance, a flat percentage per event, a dollar value per event, or other means. Using one of these factors, distributing meeting level costs 58 to individual events is easy for a meeting planner because the meeting planning system can do the work. However, before the meeting planning system can assign event level costs 58 to individual events, the meeting planner must enter the cost 58 of each item into the meeting planning system, which involves a considerable amount of data entry work since meetings often require a great many items. Therefore, in a preferred embodiment, meeting costs 58 are managed at the meeting level rather than the event level. Alternatively, the meeting planning system provides the ability to track costs 58 at the event level because the additional work used to input costs 58 at the event level enables the planner to track costs 58 for individual suppliers and produce reports for venues and suppliers, referred to as resumes, which a particular planner may require. Often such detailed information is lost year to year as planner responsibilities change. The planner uses the resume for purposes such as proof of signature for authorizing individual event orders and supplies, and to keep a head count for meal functions. Income 60 is tallied to provide a total income at the meeting level and to track income 60 for individual events that are required to be self-supporting. The event level cost 58 and income 60 information later becomes a source of history.

[0061] After a meeting is complete a meeting planner receives invoices 62 for the actual charges 64 for the products and services provided by the suppliers 32 for the meeting. The meeting planner then reconciles these invoices against the meeting planner's own records. In general, invoices 62 correspond to the supplier categories 28 and costs categories. Therefore, by entering the actual charges 64 into the meeting planning system, the meeting planning system can readily calculate and display the variance versus forecast 56 for each supplier 32, as an aid in the reconciliation process. For complex invoices 62 or invoices 62 the meeting planner has trouble reconciling, the meeting planner enters the quotes from RFPs 22, 32 and actual charges 64 for individual products and services into the meeting planning system to calculate variances 56 on an item

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by item basis. But entering quotes and charges 64 for individual products and services is a laborious process that a meeting planner will want to avoid whenever possible.

[0062] If a meeting planner chooses, costs 58 and actual charges 64 for each item are broken down into greater detail and entered into the meeting planning system. Examples of cost 58 and actual charge 64 detail are; quantity, unit cost, tax, gratuity, and service charge. The meeting planning system calculates the following: detailed costs 58, actual charges 64, extended cost which is quantity times unit price, and total cost which is the sum of extended cost, tax, gratuity, and service charge. Entering detailed cost breakdowns into the meeting planning system is a laborious process that a meeting planner would typically not undertake unless the meeting planner received an electronic data feed from a supplier 32—or venue into the meeting planning system or the meeting planner needed to track a detailed cost 58 such as tax, or gratuity for a particular cost category.

[0063] Once the meeting planner has entered the actual charges 64 from suppliers 32—into the meeting planning system, the meeting planning system can calculate other variances 66 of interest to the planning organization and owning organization such as the variance versus budget 66 and the variance versus forecast 66 for the cost and income categories and for the meeting as a whole. These variances enable the owning organization to judge the financial success of the meeting and enable the planning organization to judge the financial performance of the meeting planners. This is another example of a tool, in this case the reconciling tool, contained in the meeting planning system that gives the meeting planners the incentive to enter information needed by an organization for other purposes.

[0064] FIG. 2B illustrates a sample budget detail interface which displays dynamic budget information in accordance with the present invention. On the budget detail interface, the meeting is identified 230, by name, number, dates and/or property where the meeting will be held. For a draft budget or forecast 54 (FIG. 2A), the property, location and dates may not yet be set for the meeting. In such a case, only a name or number may identify a meeting or hypothetical budgets may be set up for various suppliers or combinations of suppliers.

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[0065] The example of a budget detail interface shown in FIG. 2B shows necessary resources divided by the category 234 which particular resource item falls under. Example categories are food & beverage, room rental, audio-visual equipment, amenities and entertainment, room setup, and miscellaneous categories. For each category 234, the planner can choose a particular supplier 236 for the resource. The user of the system can type in a particular supplier or import a supplier through the tracking system of the present invention to the budget interface. A means is provided on the interface to allow the planner to choose the entered supplier to be chosen for the budget. In the example shown, a select button 238 is shown. In addition, the budget shows a forecasted 240 cost for the particular resource from a particular supplier. As shown in the Food and Beverage line of the budget 232, when the select button 238 or other means is used, forecasted cost information is also selected for that supplier. The budget also has means to enter the actual cost 242 of a particular resource. When the actual costs are entered, the planner is able to reconcile 246 the actual costs with the forecasted costs. The planner can check off each resource as it is reconciled 246 after the meeting is over or the cost has been paid in full. A means 248 is provided on the interface to allow the planner to add a new category 234.

[0066] The planner also has the option of adding notes 244 for each resource. Notes may include information about the supplier, quantities to be ordered or reasons why the actual costs were smaller or larger than the forecasted costs. The notes may assist in the formulation of the budget or as explanations when costs are being reconciled.

[0067] Once a meeting planner has entered the actual charges 64 from suppliers 32 and income 60 into the meeting planning system, the meeting planning system can consolidate the meeting information 68 with information about other meetings enabling an organization to generate consolidated reports 70 about all the organization's meetings. Reports are generated by a report generating unit of the meeting planning system, a computer program which instructs a computer to create reports or a method for generating reports.

[0068] Each of the consolidated reports contains information collected by meeting planners in the course of using the meeting planning system to plan meetings for the meeting planner's organization. The meeting planning system retains the information collected by the meeting plan-

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ners to enable the meeting planners' organization to produce the consolidated reports. Referring now to FIG. 3B, consolidated reports will now be described and explained in detail with reference to FIGS. 1A – 2B. Each report provided in the meeting planning system may be filtered, sorted, and customized by meeting planners and other users using report generation tools and technology commercially available for customizing reports and contained in the meeting planning system. The meeting planning system exports the information in each reports in standard formats so the meeting information can be combined with other information and manipulated with other data management tools not contained in the meeting planning system.

[0069] One report generated from the meeting planning system is meeting history 38, 80. Meeting history 38, 80 is tabulated from actual charge data 64, 82 income data 60, 84 and attendance data 86 from registration 30 (FIG. 1A). A meeting planner 88 uses meeting history 38, 80 as a guide to project attendance, costs 58 and income 60 for future meetings. Meeting history 38, 80 is a valuable tool a meeting planner uses to demonstrate to a venue that the meeting will use the meeting space a meeting planner is requesting. A meeting planner uses meeting history 38, 80 to negotiate discounts from venues and suppliers 32-based on the volume of business a venue or supplier expects. A meeting planner uses meeting history 38, 80 to negotiate perks such as complimentary guest rooms, office or meeting space, waivers of service fees and other complimentary services from venues and similar perks from other suppliers-32. A meeting planner uses meeting history 38, 80, particularly attendance information, to promote a meeting to prospective sponsors and exhibitors. A manager 89 uses meeting history 38, 80 to project attendance, costs 58 and income 60 for large, individual, recurring meetings such as annual conventions, several years into the future to plan for the required internal and external resources.

[0070] Another report generated from the meeting planning system is an organization's meeting spending by supplier 90. The meeting spending by supplier report 90 totals the actual charges 92 for each venue and/or supplier for all an organization's meetings over a specific time period such as a year, quarter, month or other defined period of time. A manager 94 uses the meeting spending by supplier report 90 to identify its largest venues and suppliers to aid in selecting preferred suppliers. Consolidating venues and suppliers into a few preferred suppliers enables a manager

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to negotiate comprehensive contracts that cover all the organization's business with a supplier. A manager uses the meeting spending by supplier report 90 to negotiate reduced rates with venues and suppliers 32—since the manager now knows the total volume of business the manager's organization conducts with each supplier 32. A meeting planner 95 uses the spending by supplier report 90 to negotiate reduced rates with venues and suppliers 32—for individual meetings.

[0071] Another report generated from the meeting planning system is an organization's meeting spending by cost category 96. This meeting spending by cost category report 96 shows the trend in the total actual charges 64, 98 for each cost category for all an organization's meetings over time. Typically the trend in an organization's meeting charges 64, 98 is presented year on year. A manager 100 uses the meeting spending by cost category report 96 to identify cost categories where actual charges 64, 98 are growing faster than in other categories so the organization may introduce methods to control actual charges 64, 98 in the rapidly growing categories. Once an organization has introduced efforts to control actual charges 64, 98 in a category, a manager uses the meeting spending by cost category report 96 to monitor the effectiveness of the organization's cost control efforts. A manager also uses the meeting spending by cost category report 96 to negotiate preferred pricing with suppliers by showing a supplier the magnitude of the business the supplier will receive as a preferred supplier.

[0072] Another report generated using the present invention which is similar to the meeting spending by cost category report 96 is a meeting income by income category report 102. This report shows the trend in income 60, 104 for each income category for all an organization's meetings over time. Typically the trend is presented year on year. A manager 106 uses the meeting income by income category report to identify income categories where income 60 is declining or increasing faster than other categories. An organization may then introduce methods to address the declining income categories or direct more services and resources to the rapidly increasing income categories. A manager uses the meeting income by income category report 102 to monitor the effectiveness of the methods to address the rapidly changing income categories.

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[0073] Another report generated from the meeting management system is a meeting comparison report 108 which compares information about similar meetings or series of meetings. A meeting comparison report tabulates and displays the actual charges 64, 110 in costs categories, income 60, 112 in income categories and attendance 114 from registration 30. A meeting comparison report 108 displays actual charges 64, 110 and income 60, 112 per attendee and per meeting planner. A meeting comparison report 108 enables a manager 116 to determine which meetings are meeting or failing to meet the organization's financial goals.

[0074] Another report generated from the meeting management system is a destination cost report 118. A destination cost report 118 tabulates and displays actual charges 64, 120 based on the destinations 20 where an organization holds meetings. A destination cost report 118 tabulates actual charges 64, 120 for any collection of meetings such as a series of meetings or all meetings in a particular time period. A manager 122 uses a destination cost report 118 to identify destinations where the organization incurs the largest actual charges 64, 120 so the manager can evaluate whether there are other more cost effective destinations the organization can use. A manager 122 also uses a destination cost report 118 to identify meetings that may be relocated to consolidate meetings at a single destination and negotiate lower rates from the suppliers 32 at that destination. A manager 122 views actual charges 64, 120 in the destination cost report 118 on a per attendee basis to determine how costs effect attendance or a per meeting planner basis to determine how cost effective the organization's meeting planners are.

[0075] Another report generated from the meeting planning system is a destination income report 124. A destination income report 124 tabulates and displays income 60, 126 based on the destinations where an organization holds meetings. A destination income report 124 tabulates income 60, 126 for any collection of meetings such as a series of meetings or all meetings in a particular time period. A manager 128 uses a destination income report 124 to identify destinations where the organization obtains the greatest and least incomes 60, 126 for consideration in relocating meetings from low income destinations to higher income destinations.

[0076] A report that is similar to a destination income report 124 generated from the meeting management system is a destination attendance report 130. A destination attendance report 130

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tabulates and displays attendance 132 from registration 30 based on the destinations where an organization holds meetings. A destination attendance report 124-130 tabulates attendance for collections of meetings such as a series of meetings or all meetings in a particular time period. A manager 134 uses a destination attendance report 124-130 to identify destinations where the organization obtains the greatest and least attendance for consideration in relocating meetings from low attendance destinations to higher attendance destinations.

[0077] Another report generated from meeting information is a meeting planner performance report 136. A meeting planner performance report 136 tabulates attendance_138 trends, income 60, 140 and actual charges 64, 142 versus budget 50, 144 or other information about the meetings planned by a particular meeting planner. A manager 146 in an organization uses a meeting planner performance report 136 to compare a meeting planners meeting financial information to the organization's objectives, to the meeting planners personal performance objectives or to meeting planner performance reports 136 for other meeting planners. The meeting planner performance report 136 identifies aspects of meeting planning that require greater attention by a particular meeting planner. The meeting planner performance report compares established prices such as list, average, or preferred prices, to each planners actual charges 64, 142 as a measure of the valued added by each meeting planner or a meeting planning department as a whole. The meeting planner performance report also identifies aspects of meeting planning where a particular meeting planner is particularly skilled or has developed effective practices that will benefit other meeting planners in the meeting planner's organization.